

**SUNY Potsdam  
Administrative Unit  
Assessment Summary Form**

**Administrative Unit:** *Procurement Services*

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**Assessment Year:** *2023-2024*

**PURPOSE**

This annual assessment summary form provides the opportunity for units to follow-up on their assessment plans, track progress toward goals, and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

**SECTION 1: ASSESSMENT PLAN FOLLOW-UP**

A key component of the continuous improvement assessment process is regularly following up on [your assessment plan](#). Please review your plan and select one-third of your unit goals, along with related desired outcomes and objectives to report on the progress made. Units should select a goal that has not yet been reported on during the '22-'26 cycle.

**Selected Goal**

Improve efficiencies through the implementation of a comprehensive eProcurement System.

**Desired Outcomes/Objectives**

- Objective # 1: Increase the percentage of vendor voucher payments made using Jaggaer instead of FMS to 98% by 2025-26.
- Objective # 2: Streamline Jaggaer purchase requisition processes to decrease cycle time to 85% completion within 5 Days by 2025-26.
- Objective # 3: Working in collaboration with relevant partners at SUNY Plattsburgh and Potsdam, integrate Research Foundation purchasing into eProcurement by Summer 2023.
- Objective # 4: Develop five (5) new forms with workflow in Jaggaer to streamline purchase to payment process by FY 2023-24. Such forms may include: Travel Authorization/Requisition, Travel Voucher/Claim for Reimbursement, Honorarium Payment; and Teacher Stipend (Plattsburgh).
- Objective # 5: Implement and use the Jaggaer Sourcing Module for Sourcing Events Greater than \$50,000 by Summer 2024.

NOTE: Once completed, administrative unit leaders should submit this form to their direct supervisor for review and approval. Supervisors, upon approving the form, should submit it to the assessment committee via email at [adminassessment@potsdam.edu](mailto:adminassessment@potsdam.edu) for their review.

### Related Targets/Measures

- Objective # 1: Increase the percentage of vendor voucher payments made using Jaggaer instead of FMS to **98%** by **2025-26**.
  - Annual Targets: FY 2022-23: 90%, FY 2023-24: 93%; FY 2024-2025: 96%, FY 2025-2026: 98%
- Objective # 2: Streamline Jaggaer purchase requisition processes to decrease cycle time to **85%** completion within 5 Days by **2025-26**.
  - Annual Targets: FY 2022-23: 70%; FY 2023-24: 75%; FY 2024-2025: 80%; FY 2025-2026: 85%
- Objective # 3: Working in collaboration with relevant partners at SUNY Plattsburgh and Potsdam, **integrate Research Foundation purchasing** into eProcurement by Summer 2023.
  - Annual Targets: FY 2023-24: Process 50% of RF Purchases through Jaggaer; FY 2024-25: Process 75% of RF Purchases through Jaggaer; FY 2025-26: Process 90% of RF Purchases through Jaggaer.
- Objective # 4: Develop **five (5) new forms** with workflow in Jaggaer to streamline purchase to payment process by FY 2023-24. Such forms may include: Travel Authorization/Requisition, Travel Voucher/Claim for Reimbursement, Honorarium Payment; and Teacher Stipend (Plattsburgh).
- Objective # 5: **Implement and use the Jaggaer Sourcing Module** for Sourcing Events Greater than \$50,000 by Summer 2024.

Annual Objective Breakdown: FY 2024-25: Conduct five (5) successful sourcing events using the Sourcing Module; FY 2025-26: Conduct ten successful sourcing events using the Sourcing Module.

### Describe the progress made toward the selected goal and the related desired outcomes and objectives. Be sure to include steps taken and any information/data collected and results.

Objective #1 Progress: Jaggaer was used to process 98% of purchase order payments rather than FMS for the FY 23/24. FMS was only used to process employee travel reimbursements and contract payments which currently cannot be processed in Jaggaer. There was 2% of payments that had to be paid in FMS because of Jaggaer errors that could not be resolved.

The contract module is in the testing phase currently, but once that is in production, all contracts will be processed using the Jaggaer eProcurement software.

Objective #2 Progress: Our average rate of completion of FY 23/24 requisitions within 5 business days was 64%. There were several factors in this that we didn't have control over. One large one was that for the first 6 months of the fiscal year, our purchase requisitions were processed by SUNY Plattsburgh because of our MOU. In the 24/25 FY we should be able to make our targeted cycle time.

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Objective #3 Progress: No progress has been made on this objective. When Shared Services with Plattsburgh ended on 12/15/2023, we lost the dedicated part time employee who was charged with assisting with the implementation of Jaggaer eProcurement with the Research Foundation. Meetings will be scheduled in the near future to discuss with the Research Foundation if this goal is attainable.

Objective #4 Progress: We have implemented the Teacher Stipend form in Jaggaer and 100% of teacher stipend payments are done through Jaggaer. Our office has created a travel requisition form in Jaggaer and we are currently testing it within our office with plans to roll out to the campus in FY 24/25. The groundwork has been made for the travel voucher form to be in Jaggaer once the testing of the travel requisition has been completed after the Fall 24/25 semester.

Objective #5 Progress: The Jaggaer Sourcing Module is still in the testing phase by SUNY System Administration and a few selected campuses who have volunteered to be part of the pilot program. It is our intent to utilize this module as soon as it is in production.

**Based on the assessment data and information shared above, what planned actions were or will be taken as a result?**

We will continue to build upon the efficiencies of the eProcurement software for all Procurement, Payment, and Travel processes so that campus end users have a user friendly, transparent picture of their Procurement, Payment and travel needs.

## **SECTION 2: DATA INFORMED DECISIONS & UNPLANNED ASSESSMENT** (OPTIONAL, BUT VALUABLE)

The experiences of every administrative unit contribute to our collective narrative as a campus. We encourage you to share an example from this past year where you leveraged data or assessment type activities. This could involve planning, taking action, and/or solving a problem. Unlike section 1, there's no need for a formal reporting structure for this section. Instead, focus on a narrative that highlights what was done, the results and the impact of your efforts. Please include any related data and information when available and appropriate.

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